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Collaboration of Organization Development and Project Management

A DISSERTATION

SUBMITTED TO THE FACULTY OF THE COLLEGE OF EDUCATION, LEADERSHIP,
AND COUNSELING OF THE UNIVERSITY OF ST. THOMAS

By Eric Thomas Pool, PMP, CSM

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE DEGREE OF DOCTOR
OF EDUCATION

April 2017

UNIVERSITY OF ST. THOMAS

We certify that we have read this dissertation and approved it as adequate in scope and quality.

We have found that it is complete and satisfactory in all respects, and that any and all revisions required by the final examining committee have been made.

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Abstract

Projects across industries are failing at an alarming rate. The 2015 Project Management Institute Pulse study stated on average, only 64% of projects are successful (Pulse, 2015, p. 9). Because of these failures there has been an increasing need for more effective communications and greater efficiencies to increase project success rates. Finding organizations with these needs is the easy part; finding practices proven to positively impact these needs is the difficult part. Each of these fields, Organization Development (OD) and Project Management, employs processes and practices that, if shared, might increase success in both fields. To be clear, sharing these processes does not mean creating a new department or field, but rather utilizing the key disciplines and practices of one field to help the other become more efficient and effective.

For example, participating in OD engagements, especially when it comes to consultations covering many cultures, requires strong communication skills. “Those OD workers who are involved in international OD projects will need to pay particular attention to communication styles typical of the cultures on which they are working” (Hotes, 2011, p. 24). Communication is also a key part of Project Management; therefore, utilizing the communication skill sets found within OD to increase the effectiveness of a project manager and the success rates of the projects managed is one way for these fields to collaborate.

In addition, OD can provide an increased focus on methods to help an organization run more effectively and efficiently while, on the other hand, Project Management can provide an increased focus on successfully managing scope, schedule, and budget.

The efforts spent on change within OD tend to have a project focus but without the advantages of project management structure. However, the collaboration of these two disciplines is a relatively new area of focus. While research, such as Hornstein's (2012) article covering the

need for project management and organizational change has initiated the outline of these benefits, answering remaining questions might identify processes for collaboration, and could help increase an organization's ability to effectively execute projects and change across its enterprise, thereby benefiting those executing said projects.

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Chapter 1: Introduction

Background of the Study and Researcher's Interest

I have been employed at Mayo Clinic since 2007 where I currently work as a Senior Project Manager in Information Technology. I have completed my Master of Business Management degree, and I am currently working towards completing a doctoral degree in Organization Development with a focus on Project Management at the University of Saint Thomas, Minnesota. I view and practice project management through a lens combining Organization Development (OD), especially change management and teams, with Project Management and have experience managing diverse projects including those in the IT, HR, and Entrepreneurial fields. In addition, I teach project management with a focus on healthcare at Normandale Community College, Minnesota.

My background and areas of study help me understand the shift in focus from a traditional project management approach to the need for increased adoption of OD skills. The need to understand this shift in focus is especially true for those institutions found in organizational change management. Throughout my doctoral class work, I identified themes between the fields of OD and Project Management based off my own experience as a project manager and in some cases, an agent of change. These themes, as well as my experience and specific skill-sets helped drive the decision to focus on how OD and Project Management can collaborate to the benefit of both fields.

Problem Statement

A need exists to identify key components, principles and approaches of both OD and Project Management practices in order to increase the effectiveness and success of each field. The goal is to describe how those practicing OD can both help and learn from Project Manage-

ment and vice versa. By developing an increased understanding and appreciation between two normally separated fields, I hoped to identify a best practice for collaboration and integration of key skills.

Purpose of the Study and Research Question

The purpose of this study is to answer the question: What are the learnings from collaborating key elements, principles and practices of the OD and Project Management fields to improve the overall effectiveness of both fields based on the work of the few pioneers (e.g. early adopters of this collaboration such as the three healthcare organizations focused on for this research) exploring this collaboration?

Research Design

I developed collective samples from data gathered during my interviews with members of the OD and Project Management departments within three organizations. The value of the samples is dependent on the knowledge and expertise of individuals working in organizations participating in the collaboration of OD and Project Management. Due to the limited number of organizations exploring this new collaboration the sample size is small; however, the quality of the sample is high due to the focus on healthcare organizations and the pioneering efforts of those organizations.

Significance

Very little has been written about the collaboration of OD and Project Management, yet these two fields have much in common, and practitioners in each field are likely to learn from one another. Given the literature available and the potential for increased efficiencies in both fields, this research should prove to be valuable not only for practitioners within these fields but

also for organizations struggling with failed projects and failed relationships with OD consultants. The collected data will help outline the steps needed to collaborate successfully between these two fields. This research focused on benefits an organization can experience when combining tools, techniques, and methodologies utilized in the fields of OD and Project Management, primarily as applied to the field of healthcare. By identifying these positive outcomes resulting from the collaboration of OD and Project Management approaches, I hope to help organizations better understand what it takes to achieve success in change and project management by building knowledge and skills across both fields. All of this will, in turn, help determine the best process for future collaborations.

Definition of Terms

Organization Development - “Organization development is an effort (1) planned, (2) organization-wide, and (3) managed from the top, to (4) increase organization effectiveness and health through (5) planned interventions in the organization’s ‘processes,’ using behavioral-science knowledge” (Beckhard, 1969, p. 9).

Project Management Institute (PMI) - Definition of Project Management - “Project management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements” (*PMBOK® Guide*, 4th Edition, p. 6).

Project management *processes* fall into five groups:

- Initiating
- Planning
- Executing
- Monitoring and Controlling
- Closing (PMOK Guide, p. 6)

PMI - Definition of a Project - “A project is a temporary endeavor undertaken to create a unique product, service, or result” (PMBOK Guide, 4th Edition, p. 5).

Prosci - Definition of Change Management - “Change management is the process, tools and techniques to manage the people side of change to achieve the required business outcome” (Prosci Definition of Change Management in Context, 2016, para. 5).

Chapter 2: Literature Review

This research addressed the shifts seen in OD and Project Management. For instance, OD has seen an increase in the number of structured processes. Peter Block (2007) covered many of these processes such as, “The Discovery Model for Problem Solving.” He also outlined the consultation process through the use of flow charts and checklists taking an organized approach to OD consulting. This is not dissimilar from the field of Project Management and the use of project plans for tackling the tasks required to complete a project. Developing models to assist in the completion of work can be seen as a sign of field maturity. Therefore it is reasonable to state OD and Project Management can achieve a higher level of maturity by working together on their processes and models.

David Jamieson, Ph.D., Professor, Organization Learning & Development, University of Saint Thomas also explained the need for OD to learn from project management, especially the structured approach for which project management is known. In addition, he noted the need for project management to learn from relationship skills, group dynamics, and whole system modification utilized in OD (personal communication, 2016).

Identifying trends within OD and Project Management such as these shifts will not only add to the body of scholarly knowledge, but may also help increase the effectiveness of OD practitioners, as well as project managers. This increase in effectiveness could be applied to organizations included in this research, and also to other organizations whose members read this dissertation. The examples, although healthcare focused, are not limited to the field of healthcare because the principles are general enough to be applied to most any field. An example would be the process of documenting lessons learned. The process of identifying what worked well and

what did not is not only beneficial to one industry but to every industry. It is a fundamental aspect of learning.

The collaboration between OD and Project Management is a way some organizations are addressing the need for projects to run faster and handle the increase in complexity and difficult challenges outlined in chapter one. These challenges utilize skills identified in many disciplines (e.g. change management, business analytics, and strategic planning); however, OD and Project Management skills are prevalent.

Learning Organization

Both OD and Project Management have foundations in learning from a systemic and project standpoint. The learning most often connected with Project Management is described as, lessons learned. Some project managers utilize lessons learned sessions at the end of each project and some incorporate checkpoints along the way. However, project management can benefit from OD in regards to learning from previous efforts in what has been described as after action reviews.

The review of the literature uncovered several sources with connections to OD and Project Management learning. Effective learning from previous projects is covered in *NASA's Journey to Project Management Excellence* (Hoffman & Kohut, 2012). Simply listing what went well and what did not on a given project falls short when compared to the detail and interest found in presenting the lessons learned in the form of a story. This method has a greater ability to capture the reader's interest, especially when compared to yet another bullet list or projects pros and cons. *The Spirit of the Learning Organization* (Senge, 1990) outlines the push towards effective learning through stories and using the process to also build better teams. The impact a story has on the reader tends to be stronger when presented in this format.

These two sources outline the need for learning organizations. It is also important to know how a learning organization is formed. David Garvin (1993), in a Harvard Business Review article, outlined the main components of a learning organization.

Learning organizations are skilled at five main activities: systematic problem solving, experimentation with new approaches, learning from their own experience and past history, learning from the experiences and best practices of others, and transferring knowledge quickly and efficiently throughout the organization. (para. 15)

These five components have a direct connection to both after action reviews in OD and lessons learned in Project Management.

Learning is also accomplished by gaining an understanding of what works and what does not. For instance, the literature covers the misuse of meetings and how this can be disruptive to OD projects. “One of the major expenditures of resources in organizations is the time spent in meetings. Experience and research show that uncontrolled and mismanaged meetings are a major threat to the success of many projects and programs” (Hotes, 2011, p. 198). Learning how to better manage time and resources is a key part of Project Management and can be used to better assist OD consultants.

The Axelrod Group (2014) has also contributed to the field of effective meeting research and documented what they refer to as the Meeting Canoe outlined below.

- *Welcome people.* In this part, you greet people and begin to create an atmosphere that is conducive to doing the meeting's work.
- *Connect people to each other and the task.* The goal here is to create two levels of connection. The first level is building relationships between meeting participants. The second level is connecting meeting participants to the task at hand.

- *Discover the way things are.* In this part, you engage people in learning for themselves about the current situation.
- *Elicit people's dreams.* The goal here is to have participants imagine their preferred future unencumbered by current reality.
- *Decide.* In this part, people make decisions about what they want to do based on the way things are and their dreams, in accordance with the decision-making process identified prior to the meeting.
- *Attend to the end.* The goal here is to bring closure to the meeting by reviewing the decisions made, identifying the next steps, and reflecting on the meeting process. (p. 2)

Planning

Project Managers spend significant time working on project plans. However, managing includes not just the project itself in terms of the triple constraint (scope, schedule, and budget), but also the resources. Even though project managers may not always have resources reporting to them, project managers need to be effective at managing the resources nonetheless.

OD practitioners are often consultants working either internally or externally for an organization; so, their business models are based on services and results for the organization from a systemic point of view. This view is not limited to a unit within an organization. It is not necessarily a department within an organization either. Having these common components in the definition is the key for bringing these two fields together. It is important to try and find similarities in skill sets where the two departments can connect. Similarities make collaboration easier, whether it is between two people or two fields.

When collaborating between two fields, it is important to know the purpose for the collaboration. One of the advantages I have seen with this collaboration between OD and Project

Management includes increased effectiveness. It is important to remain cognizant of how effective OD consultants and project managers are at their work. Effectiveness leads to bigger and better projects. If projects are delivered successfully, one can hope to receive another and another and move forward.

OD consultants' effectiveness is determined not only by their initial engagement, but also by how they work with the organization as a whole throughout the consultation. Project Managers tend to focus largely on a specific project, not ignoring the project's impact on the organization, but focusing primarily on the project and secondarily on the organization; it is usually the reverse with OD consultants.

Communication

The quote below was taken from a 2013 PMI Pulse of the Profession report.

PMI's 2013 Pulse of the ProfessionTM report revealed that US \$135 million is at risk for every US \$1 billion spent on a project. Further research on the importance of effective communications uncovers that a startling 56 percent (US \$75 million of that US\$135 million) is at risk due to ineffective communications. (PMI, 2013, p. 2)

Because of the connection between communication and project costs, communication plays a key role in the success or failure of a project. In many ways almost everything project managers and OD Consultants do is a form of communication; therefore communication is another key aspect of both fields and can be used to initiate the collaboration and remove walls and silos to help reduce project failure and, in turn, project costs.

One of the key areas OD consultants and project managers hope to improve is to better understand the business needs. OD Consultants have a much richer understanding of what the organization needs, not just from a project based standpoint but from a systemic base as well.

The project manager tends to bring structured documentation and more detailed requirements to the field. Project managers are able to dig deep into details and report back in the form of executive summaries, a talent those in the OD field find valuable.

Key Traits

Another contrast between project managers and OD consultants revolves around the traits found in the practitioners of each field. Project managers tend to be analytical and look at problems and try to find solutions. Project managers look at the timelines and try to figure out ways to be efficient as well as effective. They look at budgets and try to find ways to complete a project with fewer funds and resources.

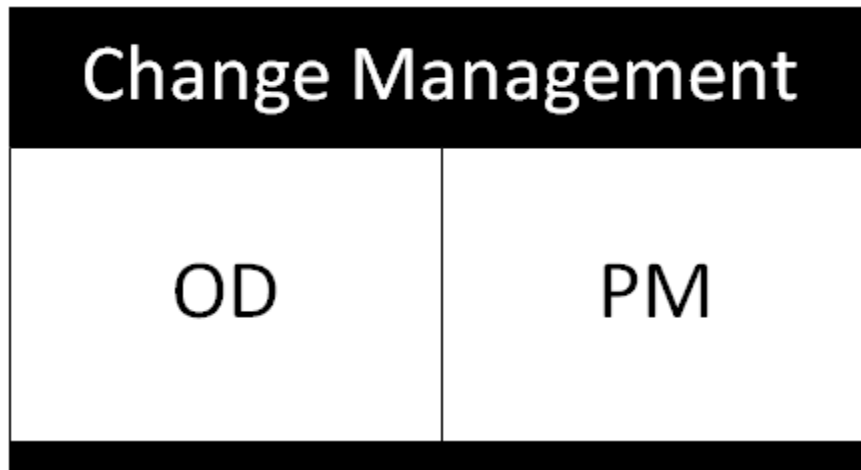
On the other hand, OD practitioners are generally known as out of the box thinkers and systemic focused, not just focused on a project within a program of the organization. They focus on how the particular project impacts the strategic goals of the organization. Having a focus moving away from the specific project to a more systemic focus is something OD practitioners do very well and from which project managers can learn.

Project managers gravitate towards different levels, macro and micro, throughout the project. Project managers move in and out of these levels based on the need of the project while OD practitioners tend to spend significant time at the macro level given the type of information available to them. OD practitioners can learn from project managers in relaying the information they find at the micro level to executives, a skill project managers have developed over their careers.

Change Management

There is a shift in how Project Management views change management. The book *Project Management for Healthcare Information Technology* (Coplan & Masuda, 2011) defines

change management as focusing on people rather than the project or product. Change Management could be used as a common language between OD and Project Management. By language I am talking about tools used to bind the two disciplines, and Change Management can be that binding agent; it can be the common tool both fields refer to and it can be the conversation starter for teams on both sides. The diagram below shows Change Management as the common ground over OD and Project Management.



Companies like Prosci are creating structured Change Management processes such as Awareness, Desire, Knowledge, Ability, and Reinforcement (ADKAR) that incorporate terms and descriptions both OD practitioners and project managers can relate to and understand.

ADKAR® is a goal-oriented change management model that allows change management teams to focus their activities on specific business results. The five parts of ADKAR—awareness, desire, knowledge and reinforcement®—show the milestones an individual must achieve for change to be successful. These milestones were initially identified

through Prosci research, and the model has its origins in a movement to align traditional change management activities with a project's results or goals. In fact, the Prosci ADKAR Model was first used to identify if certain change management activities (such as communication and training) were achieving desired organizational change results.

(Prosci, 2015, para. 1)

With this model the stakeholders need an awareness of the change, a desire to support and participate in the change, and knowledge of how to change. Ability to implement requires skills and behaviors. The traits mentioned earlier, the analytical part of project managers, and the systemic component for OD practitioners are found in the steps of the ADKAR process. The need for the change should be analyzed and explained in detail. Change should be systemic focused because change not only impacts those going through the change, but also ancillary team members.

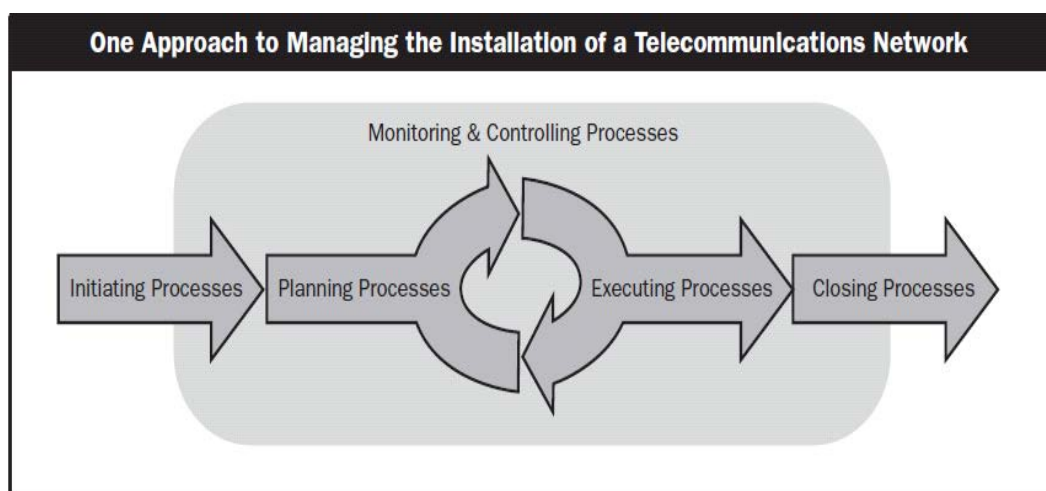
Furthermore, Hornstein (2012) covers the need for increased rigor in regards to the utilization of Change Management in Project Management. His article, "The Need to Integrate Project Management and Organizational Change" describes just how little is mentioned in regard to Change Management in the Project Management Body of Knowledge (PMBOK).

Since Project Human Resources Management appears as one of the knowledge areas, one might expect organizational change management to fall under it. But this is not the case. Included under this rubric are four processes: human resource planning, acquisition of team members, development of the project team, and team management. None of these refers in any fashion to organizational change, and none of the remaining five process groups or eight knowledge areas addresses it. (Hornstein, 2012, para. 5)

This lack of education and training around Change Management in the field of Project Management might explain some of the potential shortcomings in project managers' abilities to effectively guide project teams through the change management process.

Process

Another connecting point concerns processes and steps. The Project Management Institute (PMI) outlines the processes of a project below.



Project Management Body of Knowledge (PMBOK Guide) 4th Edition (2008, p. 19)

These processes are laid out, easily identified, and structured to lead to project success. The field of OD is perhaps a little less developed than Project Management in regards to phases and can gain from the experience Project Management provides.

Peter Block (2007) outlines processes for the field of OD, centered on contracting and consulting. Even with these steps/phases there is room for improvement, and aligning with Project Management's level of detail could provide the improvement.

Peter Block's Five Phases of Consulting:

Phase 1: Entry and Contracting

Phase 2: Discovery and Dialogue

Phase 3: Analysis and the Decision to Act

Phase 4: Engagement and Implementation

Phase 5: Extension, Recycle, or Termination (Block, 2007, p. 28)

The lack of a formal process or methodology in OD could be an area of growth by incorporating best practices currently utilized in the field of Project Management. Organizations like the Organization Development Network (OD Network) could become a gold standard for OD practice similar to the role PMI plays in the field of Project Management. Project Management has identified several industry standards when it comes to effectively managing projects. Arguably the two most prevalent methods are Waterfall and Agile. A PMI article, originally published as part of the 2012 PMI Global Congress Proceedings, covers some of the differences between these two methods.

Waterfall

- Detailed, long-term project plans with single timeline
- Definitive and rigid project management and team roles
- Changes in deliverables are discouraged and costly
- Fully completed product delivered at the end of the timeline
- Contract-based approach to scope and requirements
- Customer is typically involved only at the beginning and end of a project
- Linear-phased approach creates dependencies

Agile Project

- Shorter planning based on iterations and multiple deliveries
- Flexible, cross-functional team composition

- Changes in deliverables are expected and less impactful
- Product delivered in functional stages
- Collaborative and interactive approach to requirements
- Customer is involved throughout the sprint
- Concurrent approach seeks to reduce dependencies. (Fair, J. 2012, para. 18)

In addition to providing industry standards in the form of methodology, definitions, and education, PMI also provides multiple industry standard certifications, including one of the most recognized project management certifications, the Project Management Professional (PMP).

The Project Management Professional (PMP)® is the most important industry-recognized certification for project managers. You can find PMPs leading projects in nearly every country and, unlike other certifications that focus on a particular geography or domain, the PMP® is truly global. As a PMP, you can work in virtually any industry, with any methodology and in any location. (PMI, 2017, para. 1)

In many ways the OD Network has already started this journey. They have addressed the need for increased networking, education, and publications. However, a greater push towards certifications and an industry standard manual similar to PMI's PMBOK is still an area of need. If the OD Network addresses these areas they could be the first to bring a degree of unity to the field of OD in the way PMI has for Project Management. The viability of this role for the OD Network could also be considered another area for future research.

Knowing when to apply the structure PMI is known for is also worth discussing. The organizations researched all decided, without discussions between the organizations, to have OD and Project Management collaborate because of a single project deemed to be one of the most important endeavors attempted by the organization. For Mayo Clinic it was the formation of the

EPMO and more recently the EMR project. For Mercy Health System it was the Malcolm Baldrige National Quality Award. For Rockford Health System it was their EMR project. The level and rigor of process was chosen based on the size of the initiative and the potential impact on the organization. The greater the size and impact, the more the organization focused on the process.

When and Why to use OD

One of the earliest examples I found covering the collaboration between OD and Project Management, in this case project managers, came from a PMI article published in 1979. The author, Milan Moravec, employed at Bechtel Power Company outlined some of the key areas where OD principles can assist project managers in more effectively managing projects and teams. The article covered the need for early adoption (when the team is formed), improving relationships, adding new members to an already existing team, when project roles have changed, and in troubled projects.

The following is an excerpt from the article, "How Organization Development can Help and Hinder Project Managers."

- When a project team has just been put together. OD techniques can aid in planning and mutual goal setting, as well as ensuring that all members of the project team are committed to the goals and to their part in achieving these goals.
- When the project manager seeks to improve contractor-client interfaces and relations, or to make sure they remain healthy and viable. As a member of an organization providing project services to a client, the project manager must not only represent the contractor to the client, but also must represent the cli-

ent's changing objectives and concerns to the contracting company. Effective and timely communication systems are essential here, and OD intervention can help identify and remove communication, organization, and procedural blocks.

- When new people new the project. They must be integrated into the team and brought up to speed on its problems, issues, and operations, and OD can help these processes go more smoothly.
- When procedures or responsibilities on the project have changed. OD can help project team members comprehend the implications of new parameters, translate the changes into work practices and plans, and clarify new responsibilities and interfaces.
- When it is necessary to readjust objectives. A significant change in government policy, cost of materials, client needs, or even climate conditions can make it necessary for the project manager to take stock of where the project is now and to modify its direction. OD makes response time shorter.
- When there is a problem. If interface conflicts, morale crises, or mysterious snafus suddenly threaten the project, OD is often called in as a troubleshooting mechanism. But this is the last sort of condition under which a project manager should use OD. Judicious use of OD interventions throughout the life of the project should prevent the accumulation of problems and tensions which bring about crises in the first place. (Moravec, 1979, para. 9)

The following except from the article, "When PMs OD, Projects Run Better," also outlines some of the key components OD can bring to projects. The interesting component is how

these principles create the environment for a learning organization, one of the focus areas mentioned earlier.

Grounding the organization in these key principles creates a learning organization. Project or functional managers can enlist the help of practitioner to support fixing these problems. However, the organization must fix the problems.

The typical interaction with an organization entails six steps:

1. Engaging and establishing the goals
2. Assessing the organization's needs
3. Providing feedback to the organization
4. Creating an action plan
5. Performing interventions, implementing the results and evaluating their success
6. Closing the engagement. (eCameron, 2016, para. 6)

The book, *Advanced Project Management: A Structured Approach*, also outlines the positive role OD can play in the creating of effective teams. “The process of team development can be accelerated by the use of organization development interventions on team-building and action-learning-type courses on teamwork” (Harrison & Lock, 2004, p. 281).

Summary

Many of the themes outlined within this chapter are also mentioned as part of Kerzner's (2009) 16 points to project management maturity.

1. Adopt a project management methodology and use it consistently.
2. Implement a philosophy that drives the company toward project management maturity and communicate it to everyone.
3. Commit to developing effective plans at the beginning of each project.

4. Minimize scope changes by committing to realistic objectives.
5. Recognize that cost and schedule management are inseparable.
6. Select the right person as the project manager.
7. Provide executives with project sponsor information, not project management information.
8. Strengthen involvement and support of line management.
9. Focus on deliverables rather than resources.
10. Cultivate effective communication, cooperation, and trust to achieve rapid project management maturity.
11. Share recognition for project success with the entire project team and line management.
12. Eliminate nonproductive meetings.
13. Focus on identifying and solving problems early, quickly, and cost effectively.
14. Measure progress periodically.
15. Use project management software as a tool—not as a substitute for effective planning or interpersonal skills.
16. Institute an all-employee training program with periodic updates based upon documented lessons learned. (Kerzner, 2009, para. 1)

Knowing when to use OD and Project Management principles is just as important as identifying the correct principles to use. As stated earlier, little has been published on the topic of collaborating between OD and Project Management. However, the quality of what has been

published outweighs the lack of quantity. The substance found in the research paving the way on this topic and the sources the information stems from in combination with the potential for further research make this an intriguing topic.

Few would argue the need for improved success rates for projects or the need for more quality consultations. The collaboration of OD and Project Management has the potential to address these needs and ultimately add to the effectiveness of both fields.

Chapter 3: Research Methodology

For my research I used a qualitative methodology including a convenience sample of the following high profile organizations - Mayo Clinic, Mercy Health System, and Rockford Health System - whose pioneering efforts into the collaboration of OD and Project Management make them logical examples.

Qualitative Research Methodology:

Is an approach for exploring and understanding the meaning individuals or groups ascribe to a social or human problem. The process of research involves emerging questions and procedures, data typically collected in the participants setting, data analysis inductively building from particulars to general themes, and the researcher making interpretations of the meaning of the data. (Creswell, 2013, p. 32)

Convenience Sample:

A convenience sample can be defined as a sample in which research participants are selected based on their ease of availability. Essentially, individuals who are the most ready, willing, and able to participate in the study are the ones who are selected to participate. (Given, 2008, p. 124)

The number of individuals interviewed helped to reinforce the sample. I chose a total of 11 leaders due to their position and/or expertise relating to OD and/or Project Management within the organization. In order to qualify as leaders each of the individuals interviewed needed to play a role in either OD or Project Management supporting their specific organization across multiple departments.

The goal was to include organizations at different levels of maturity regarding their collaboration between OD and Project Management disciplines; for example, organizations experimenting with the collaboration between these two disciplines, and organizations actually implementing this collaboration. For reference, Organizational Maturity can be defined as, "...the level of organization's readiness and experience in relation to people, processes, technologies and consistent measurement practices" (Deloitte, 2017, para. 1)

A better understanding of the steps these organizations have taken to collaborate may help other organizations identify a process in regard to the collaboration of OD and Project Management and determine the next steps required to implement this collaboration. In fact, my research findings could provide the groundwork needed to move this collaboration of OD and Project Management from experimental to best practice, and show the advantages of exploring this new frontier.

Participant Selection

The major source of data for this research came from interviews. I asked participants the following questions regarding OD and Project Management within the respective organizations. I chose these questions to help better understand the relationships between these two fields and identify strengths and weaknesses in hopes to provide opportunity for growth.

1. Has your organization attempted to integrate Organization Development and Project Management?
 - a. If yes, how has your organization attempted to integrate Organization Development and Project Management?
 - i. What have some of the success factors been when integrating Organization Development and Project Management?

- ii. What caused the initial focus on Organization Development and Project Management?
 - b. If no, do you think there are benefits in integrating Organization Development and Project Management?
 - i. If yes, what are they?
 - ii. If no, why do you think there are few benefits?
- 2. Have you heard of other organizations integrating Organization Development and Project Management? If yes, can you tell me about their experiences with that process?
- 3. What are some of the common qualities between Organization Development and Project Management (e.g. tools, methodologies, skills, etc.)?
- 4. What do you think organization development practitioners can learn from project managers and vice versa? How might that enhance the work done today?

The participants' answers helped generate the samples used in my research. My research depended largely upon the quality of the answers received during the interviews. When I saw a need for further information or clarification regarding responses from the interviewee, I conducted a follow-up interview. One of the key components of this research was the participants' perception of the collaboration of the disciplines within the organization. Insight from within the organization will provide useful information for other organizations interested in this research.

Figure 1 is an example of how the information from the transcripts was organized to help identify the key themes discussed in greater detail in Chapter 4. This matrix made it easier to locate repeat words, key statements, and specific phrases explaining the collaboration between OD and Project Management within the three organizations. This type of analysis was outlined in several of the steps covered in the article, "Techniques to Identify Themes in Qualitative Da-

ta” (Ryan, G. & H.R. Bernard, 2003).

We begin with word-based techniques. Word repetitions, key-indigenous terms, and key-words-in-contexts (KWIC) all draw on a simple observation—if you want to understand what people are talking about, look at the words they use. (Ryan, G. & H.R. Bernard, 2003).

Interview Questions	1. Mayo Clinic (EPMO)	2. Mayo Clinic (EPMO)	3. Mayo Clinic (OLOD)
<p>1. Has your organization attempted to integrate Organization Development and Project Management?</p> <p>a. If yes, how has your organization attempted to integrate Organization Development and Project Management?</p> <p>i. What have some of the success factors been when integrating Organization Development and Project Management?</p> <p>ii. What caused the initial focus on Organization Development and Project Management?</p> <p>b. If no, do you think there are benefits in integrating Organization Development and Project Management?</p> <p>a. If yes, can you tell me about their experiences with that process?</p>	<p>- Yes, our organization has integrated organization development and project management. So how we've realized this, there's through some of what we've done here is recognizing that anything you do in an organization you know, really requires its resources, its core resources, its people to make things happen.</p> <p>- Use it organization wide so it is recognized that it's a discipline that's adopted across the enterprise. Recognize from the top leadership but also provides them that framework, the discipline and the tools and methodologies, the terminology you know, the structure, the training that can really come through that discipline to focus on project management.</p> <p>- we didn't have anything that+C2+B:51 really taught project management here at Mayo Clinic.</p> <p>- So there is some inward learning that began first with a small team developing okay what is the methodology, what are the standards, how does this work, you know, all of this type of things we had kind of a nucleus of the small group working on that. And then we recognized it really expands across the enterprise, we needed to tie it in with the organizational development. That framework so that that could provide the approach for really disseminate+C2+C2g it across the organization.</p> <p>- So with that how do we partner not just with our internal organizational development staff but what's happening out in the rest of the area but also in the state.</p> <p>- The third grant we've got is the biggest and largest that we obtained about two years ago for \$300,000 and with that okay what's next? We've got two certifications. Well we wanted to build out the full PMP curriculum. So this one we're actually bringing all the parties together. So Minnesota provides the funding. We've got our RCTC. We've got our human resources organizational development group and we've got the EMP along with a variety of other groups building out this curriculum across Mayo Clinic that's going to expand from our half dozen classes that we started with initially to what I call broad and deep.</p> <p>So it's going broader across what project program and portfolio management is and it's going up higher and lower. So it's going to be not just for project managers but it goes down into the team members that are working on the projects but were also going up to the senior leadership and the sponsors. So that they know about this discipline as well.</p>	<p>- So you know, as Mayo's had this very complicated strategic plan, historically they came in and just worked on the balance scorecard I think was the first step in that direction and then seeing okay how do we know what we're working on is moving the meter on these things.</p>	<p>- The ways that we have been doing it one of the areas in OD where we spent quite a bit of time is around change and transformation.</p> <p>- We find that if you were able to embed some of the change practices, change methodology into the overall project management plan, that it becomes more of a cohesive process and it will get done along with the milestones since you would have done a project plan.</p> <p>- So the success has been around the overall communication. Making sure that everyone is on the same page that as we communicate the progress of the project, we are also using the opportunity to inform our stakeholders, to inform the organization of what's happening giving opportunities for them to ask questions and get their questions addressed.</p> <p>They also think of areas that you may not think of when you were doing a project plan where you focused more on the processes not necessarily always on the people. So I think blending the two together you're looking at both aspects, both the people side of the project as well as the other process flows and workflows that you maybe – that you would typically look at when you drive a project.</p>
	<p>- NASA and what they have done I mean it's humongous because just understanding the discipline of project management that Ed Hoffman has put in place there for being so important in the management of these critical projects to avoid errors that you know aren't just ops it was you had a bad implementation, I mean they become global news. I mean how critical is that?</p> <p>- So Hewlett Packard again met with them and do it pretty regularly but it's interesting how they recognized that just from the different stages of development for their project management staff it's a core competency but they also have a career framework.</p> <p>- But they actually have competency assessments that consists not only of did you understand the material and the course and what you're doing there but then there is the experience side. So with the education, do you have the experience and have you proven it when you're out there --</p> <p>- Siemens is actually another one that does that like that too and they have different gradations.</p>	<p>- Number one was education.</p> <p>So I started working with Abby to write this grant to really switch up and bring your education into the current state right? So it's not just going to a classroom for three days. Let's do some blended learning. Let's talk about what do we really need. So we did a need assessment. We talked about it's not just about teaching the PMBOK. We don't want to regurgitate a training class around the PMBOK. But it's about what's the project manager role whether you're beginning, intermediate or advanced. What's the VA role? Same thing. What is does a project sponsor need to know? What do our executives need to know? And what about the talent triangle right?</p>	<p>- So again focusing more on change but also I would say overall our organization effectiveness. I am on the conference board council for change management. We recently changed our name to change and transformation looking at more of org effectiveness as opposed to only change, change management practices so if it's under the scope of the council. On that council, there are several other organizations that are doing similar type work. I would say that some that come to mind right off the bat would be places like Nike.</p> <p>- We have McKesson, Mayo, Muir, probably going to expand and add a few more.</p> <p>across a variety of different industries, we're seeing that this is more of the trend and places like Cisco are probably I would say maybe ahead of the curve if you will because they've had various processes that they've used for a long time. So they've blended the two and they've done it quite successfully.</p> <p>- Yeah.</p> <p>So I'll just say with most of the companies, they have developed their own tools. I would say I see that more of the norm.</p> <p>They are probably only a few like us that maybe use like set tools like Prosy for instance but many of them have adopted their own tools.</p> <p>What they've done is so they have these change management practitioners but they are part of the project team. So they are using the tools and methodology but hand in hand. They're also in software development there's the agile methodology. So they have incorporated that and kind of expanded the scope to include the more cohesive process if you will that they use. But they are involved from the onset. They are part of the team. They're pulled in right at the beginning of a project when they are still just kicking off the concepts and then they stick with that project team through the life cycle</p>
<p>3. What are some of the common qualities between Organization Development and Project Management (e.g. tools, methodologies, skills, etc.)?</p>	<p>- They're wanting to utilize staff or take resources and to have them grow in their maturity and their educational experience.</p> <p>Manage from the top it's very important that with some of these types of initiatives that you have the top leadership engagement and awareness and driving that this is something of value to the organization.</p> <p>- Increased organizational effectiveness and health. Absolutely. So where organizational development does it from kind of the skills development type of component where we see project management you know, assisting the organization is I like to put it as simplistic as project management is how you execute your strategic plan.</p> <p>- And so that's what increases the effectiveness of the organization and the more effective you do project management the more effective and timely the execution of your strategy is going to be.</p> <p>- Planned interventions and I'm not as familiar on the organizational development side but I'm assuming that you know, as staff are developing there if they're not developing [incomprehensible (0:17:45)] you kind of intervene and make corrections or changes or whatever. You know, so it suits what the needs of the organization are also with matching the individual. I would say that we do the same on the project management side so it fits in very nicely. We have distinct processes for how to manage the project but then also for helping the project manager develop in that framework as well.</p>	<p>- partnership at Mayo Clinic with Rochester Community Technical College for a while on education and keep pushing to invest in it education because that's really what propels all the studies say you know, you got to invest in educating your employees or career growth or continuing to grow their skills regardless of what the level of skill is.</p>	<p>- So I think I see similarities between the two in that we come up with a plan. We have various ways of facilitating the process as you go along. You have meetings set up. You have checkpoints, progress against plan.</p> <p>- We have opportunity to maybe apply some more standard practices across the board.</p> <p>- So there to me needs to be a blend between allowing for that creative aspect of the discipline as well as accomplishing your goals and maybe having a defined path to get there.</p>
<p>4. What do you think Organization Development practitioners can learn from Project Managers and vice versa?</p> <p>a. How might that enhance the work done today?</p>	<p>- So from a project management perspective you have to think of organizational development because if you've got a team, they can be the best team in the world but if they don't understand what they're doing and they're not appropriately trained and they don't know what their roles are and they don't have the skills you're not probably going to get too far. So you really need to have the combination of the two.</p> <p>- To recognize that change is going to be part of what you're trying to do because keeping status quo doesn't get you anywhere. It keeps you kind of you know, flat lined.</p> <p>- So you really need to start looking at new innovative ways of making things more successful on projects. How you get them done more quickly, how do you get the team together working collaboratively as a high performing team. How do you make sure when the project gets done that this staff that you've been working with don't just leave oh yep I did another project but have some additional skills that help them move ahead so they can do more complex projects in the future</p>	<p>- The one other piece of that that is an interesting partnership and we'll see how this flows out with our partners in OLD because how they have been brought in which has been fabulous is that they're our infrastructure of support.</p>	<p>- I think in project management they're more standardized than we are. So maybe having a set of tools that we use would benefit us.</p> <p>- Instead of starting from scratch with each intervention. With OD, we do leverage off each other so we come up with ideas and we bounce them off each other because we find that collectively we can come up with a better plan.</p> <p>And that aspect of it I think maybe project management could learn from us of collaborating across projects.</p> <p>- To glean from each other rather than working in silos.</p>

Figure 1. Sample of the matrix used to identify key themes from the interviews.

Institutional Review Board (IRB) information can be found in appendix A-D.

Validity

I established validity through the use of cross-verification. I asked all participants the same questions. I looked for commonalities between the responses and used this information to assess the themes uncovered during the interviews.

To assist in the establishment of validating the information, I coded the transcripts in order to track repetition of emerging themes. If multiple interviewees used the same themes to describe the collaboration of OD and Project Management, especially for the same question, the validity of the data should increase.

Results

I presented my results to the University of Saint Thomas, Minnesota when I defended my dissertation. Results will also be presented to those organizations participating in the study as a form of follow-up communication and information sharing. Finally, the results may also be shared through publication in academic journals and industry journals such as the Organization Development Network or Project Management Institute.

Overview of Next Steps

The following chapters introduce the organizations participating in this research and the results of the interviews. I also outline the level of collaboration used within those organizations and describe the development of the case studies based on data from participant interviews.

Chapter 4: Research Findings

Purpose

The purpose of this study was to identify key components for collaboration between OD and Project Management in order to increase the effectiveness and success of each field. By developing an increased understanding and appreciation between two normally separated fields, this research could identify a best practice for collaboration.

Research Question

What are the learnings from collaborating key elements, principles and practices, of the OD and Project Management fields to improve the overall effectiveness of both fields based on the work of the few pioneers (e.g. early adopters of this collaboration such as the three healthcare organizations focused on for this research) exploring this collaboration?

Research Findings

Using the findings from the following questions, I was able to uncover key themes within the data.

- I.* Has your organization attempted to integrate Organization Development and Project Management?
 - a.* If yes, how has your organization attempted to integrate Organization Development and Project Management?
 - i.* What have some of the success factors been when integrating Organization Development and Project Management?
 - ii.* What caused the initial focus on Organization Development and Project Management?

- b.* If no, do you think there are benefits in integrating Organization Development and Project Management?
 - i.* If yes, what are they?
 - ii.* If no, why do you think there is a lack of benefits?

Question 1: Mayo Clinic - Enterprise Portfolio Management Office (EPMO)

Mayo Clinic has taken a number of approaches to collaborate between Organization Development and Project Management. This collaboration began with recognizing the importance of their resources and the role they play within the organization. Mayo Clinic understands the impact resources have on organizational initiatives and therefore understood the need for this collaboration between OD and Project Management.

Recognizing the people side of organizations and projects is critical for buy-in, and for this to be successful it must initiate from leadership. Mayo Clinic understood the need for leadership engagement and direction not only for increased buy-in, but also for the collaboration to occur across the enterprise. The collaboration between Organization Development and Project Management started with a focus on resources within Project Management and then extended to those in Organization Development.

The initial discussions around collaborating between Organization Development and Project Management at Mayo Clinic centered on the need for increased education, specifically Project Management education. When interviewing Mayo Clinic leadership, I became aware of just how important their role as leaders of this change was. They understood the need for this to be a systemic change, and therefore they knew it would require consistent and clear communication from many of the organization's leaders.

In addition to this top down approach they understood the need for structured tools, processes, and definitions to assist with the changes. The field of OD in general also stresses the need for leadership support when it comes to major changes within an organization. The top down approach holds true at Mayo Clinic and proved successful in executing this collaboration between OD and Project Management. The understanding of the need for more education within Project Management not only opened the doors to Organization Development, it also helped leadership at Mayo Clinic recognize the need for this to be a systemic approach rather than limited to one department. It would have been very easy for leadership to focus only on one or two departments within the organization without taking the systemic view OD brings to the table. However, leadership had enough foresight to see the advantages in this collaboration to focus it on the entire enterprise. This does not mean it is being utilized in every organizational initiative, but it is available for use within any project and is becoming more of a standard when dealing with large initiatives.

The Mayo Clinic participants' responses to question one during the interviews revealed components of the OD definition, specifically, the need for leadership engagement and a systemic rather than a departmentalized approach. Additional parts of the OD definition, continued to resonate within the other interviews.

The use of education to collaborate between OD and Project Management at Mayo Clinic expanded with the focus on grants. The largest grant associated with this collaboration brought the two departments closer together than ever before. Not only did the grant, focused on certifications, include the EPMO and the Office of Leadership and Organization Development (OLOD), it also included the state of Minnesota and Rochester Community and Technical College (RCTC).

This expansive collaboration with internal and external stakeholders played an important role in bringing OD and Project Management together because it not only spanned the organization, but it also engaged others outside of the organization. This was further enhanced by the support of organizational leadership and sponsors. The other key aspect of this program was the inclusion of all team members and senior leadership, as well as, project sponsors. The broad focus helped expand the advantages and collaboration across a larger number of resources, and, therefore increased engagement and buy-in.

In addition to grants, education, and leadership, Mayo Clinic also received consultation from outside, helping to outline the need for increased understanding of organizational initiatives and for developing methods to prioritize and execute on those initiatives. This process of understanding the needs of the organization and how they were prioritized ended up facilitating the formalization of the Enterprise Portfolio Management Office (EPMO). The interesting factor here is external consultants, with OD skills, in some ways helped create the Project Management structure at Mayo Clinic. Once the EPMO was formed, it later recognized the need for more OD focus across the enterprise, through the use of the classes I mentioned earlier, bringing the collaboration of OD and Project Management full circle.

Question 1: Mayo Clinic - Office of Leadership and Organization Development (OLOD)

When interviewing participants from the Office of Leadership and Organization Development (OLOD) at Mayo Clinic, I found the collaboration between OD and Project Management taking shape in the planning and execution of projects. The department of OLOD started to recognize the need for this collaboration because of their engagement with companies such as Prosci. This engagement was a result of senior leadership's commitment to adopt a formal change

management process. This generated more focus on change and transformation, creating a culture more accepting of this collaboration.

This culture change has paved the way for changes in practices, methodology, and project management. For example, project plans now include increased change management components focused largely on ADKAR. Previously, change management was not a significant part of project plans, or in some cases, left out completely. The shift in how projects at Mayo Clinic are managed helps to keep critical aspects of a project, such as change management, at the forefront. This collaboration of change management activities and project plans creates a more effective way of managing projects where the focus is not only on the tasks but also the impact to stakeholders. This also helps to ensure people are not left out of the process.

Another key area of collaboration is around communication where OLOD has gained insight from Project Management on how to better communicate both internally and externally. More effective communication has helped the department address issues and respond to concerns with more accuracy and efficiency than before. This process not only positively impacts the organization but also creates an environment of increased buy-in from stakeholders. Even project management terms are becoming more commonplace within OLOD. This in turn provides invaluable information to the organization as to what could positively or negatively impact the key objectives, giving it time to react and change course if needed.

When it comes to successful collaboration, OLOD also recognizes the importance of early adoption. This applies to leadership within the organization, as well as projects within a department. Understanding and acting on the need for this collaborative approach to projects and OD initiatives, along with stakeholder buy-in, are critical for success. In any communication situation involving multiple stakeholders, there are significant disadvantages to joining a conver-

sation part way through. Time is wasted while latecomers are brought up to speed; they may not get all of the pertinent information; they may feel rushed, etc. The same applies to the collaboration between OD and Project Management. Mayo Clinic recognized the need for these two departments to work together early on in order to minimize these inefficiencies .

The department of OLOD also collaborates with the EPMO on definitions and standards. The current focus is on change management and how to continue to include that practice within a project. The integration of the two in regard to project plans was mentioned earlier. Mayo Clinic continues to move this collaboration forward with the focus on vocabulary, helping project managers obtain an increased understanding of what change management is and how it can help increase the success rates of their projects.

In addition to collaboration with the EPMO, OLOD offers a three-day Prosci certified course, inviting project managers within the organization to participate. This inclusion of project managers into the world of OD is another key aspect of creating cohesive teams. The learning does not stop here, it continues as members of the OLOD team reach out and speak to project managers. This open communication and building of trust adds to the strength of the collaboration. One of the interesting aspects of this collaboration revolves around how common terms are now being shared across ODOD and Project Management. Mayo Clinic is also seeing this in regard to toolsets. Both OLOD and the EPMO are utilizing stakeholder assessments, communication plans, risk assessments, and others. They may not always be called the same thing, but they are being utilized in similar ways. These tools serve as another common denominator assisting in the overall collaboration between departments.

Question 1: Mercy Health System

Mercy Health System utilized a less formal approach to collaboration between OD and Project Management than Mayo Clinic. The need for the collaboration became apparent through the Malcolm Baldrige National Quality Award process. The Malcolm Baldrige National Quality Award is:

An award established by the U.S. Congress in 1987 to raise awareness of quality management and recognize U.S. companies that have implemented successful quality management systems. Awards can be given annually in six categories: manufacturing, service, small business, education, healthcare and nonprofit. The award is named after the late Secretary of Commerce Malcolm Baldrige, a proponent of quality management. The U.S. Commerce Department's National Institute of Standards and Technology manages the award, and ASQ administers it. (ASQ, 2016, para. 1)

The process of applying for, and eventually winning, the Malcolm Baldrige National Quality Award helped the organization understand the advantages of being an integrated organization. This focus on collaboration throughout the organization has created an environment where very few walls or silos exist. This environment created the opportunity for the collaboration between OD and Project Management to occur. This process also led the organization to adopt learning practices where the lessons from previous endeavors could be utilized to increase the success rates of future projects. Learning organizations was a key component covered in the literature review and Mercy Health System utilized this part of their identity to informally collaborate between OD and Project Management.

This process of learning, especially in the form of lessons learned documentation, is well utilized in project management and integrating it into the organization from a systemic point of

view is another key step in bringing Organization Development and Project Management together.

Other key components of the collaboration between OD and Project Management included the need for clear and consistent messages from leadership. Mercy Health System identified the need for such communication in several interviews, emphasizing while it should initially come from leadership it should be a shared goal for the organization as a whole. Mayo Clinic also outlined this as a critical success factor.

Question 1: Rockford Health System

Rockford Health System also utilized a more informal process for the collaboration between OD and Project Management. The difference in collaboration when compared to Mayo Clinic and Mercy Health System is at Rockford the collaboration was primarily project driven. The organization was in the process of moving to a new Electronic Medical Record (EMR) and recognized the need for change management and stronger communication. Rockford Health System understood the need for stakeholder engagement and strong communication throughout the EMR project. It was this understanding that ultimately led to the informal collaboration of OD and Project Management.

Change management, especially in how the EMR project was going to impact the employees, became a key aspect of successfully collaborating the strengths of OD and Project Management. While Rockford Health System had not focused as strongly on OD as Mayo Clinic and Mercy Health System, it was able to quickly understand the need for OD through the use of change management within its projects. In other words, the strength of the Project Management department at Rockford Health System helped identify the need for OD naturally through the people side of change.

The second question yielded the following results:

2. Have you heard of other organizations integrating Organization Development and Project Management? If yes, can you tell me about their experiences with that process?

Question 2: Mayo Clinic - Enterprise Portfolio Management Office (EPMO)

Part of gauging an organization's ability to collaborate between OD and Project Management is to determine if they performed any benchmarking to see what other organizations have accomplished when it comes to this collaboration. When asked about the knowledge of other organizations practicing this collaboration Mayo Clinic identified the following:

- NASA
- Hewlett Packard (HP)
- Siemens

Mayo Clinic mentioned the work NASA has done around critical projects to avoid errors. Given the risks associated with the field of aerospace, there is an increased need for rigorous processes and methodologies. As a result of this increased need, the collaboration between fields, including OD and Project Management, is a critical part of their success.

Mayo Clinic also discussed the focus on training and education found in other organizations like HP and Siemens. Education and training continue to rise to the surface as key components of this collaboration. Mayo Clinic also stated other organizations have placed more emphasis on training and testing or increasing the opportunity for more experience.

Question 2: Mayo Clinic - Office of Leadership and Organization Development (OLOD)

Mayo Clinic's OLOD department also outlined several organizations practicing the collaboration between OD and Project Management. These included:

- Nike

- McKesson
- Muir
- Cisco

Mayo Clinic mentioned the focus with these organizations was primarily on change and organization effectiveness. Remember, effectiveness was mentioned in the OD definition and change management has been identified as another key connection point between OD and Project Management. The companies who seem to be experiencing the most success with this collaboration have done so through the use of blending the processes found in OD and Project Management. This is not unlike the integration of the change management and project plan processes discussed earlier, or the use of common vocabulary and tools. The ability to use tools developed within the organization and to integrate change management practitioners within the project teams continues to show up as a best practice. This integration of teams also needed to occur at the beginning of the project and remain with the team until the project was completed in order to be successful. This collaboration between OD and Project Management is key to the successful collaboration found within organizations considered at the top of their game.

Question 2: Mercy Health System

No examples were given.

Question 2: Rockford Health System

Rockford Health System discussed the efforts a team at the University of Pittsburgh Medical Center (UPMC) utilized when collaborating between OD and Project Management with a focus on the home health agencies UPMC was purchasing. These purchases required change management and communication. These two components were combined with project management and communication toolsets.

One of the requirements was to have all of the health systems integrated, using the same formats and processes. This integration of health systems required collaboration between OD and Project Management in order to achieve success. The change management component of this process also utilized lessons learned, a project management practice, to improve the process as each health system was purchased.

Rockford Health System also identified Epic as an organization practicing the collaboration between OD and Project Management. They used it for their implementations, especially focusing on the impact to people and the education of their resources. Epic used the collaboration between OD and Project Management to better understand the people side of change, another common theme. The combination of education and training, along with change management, helped give Epic an advantage in improving how fast they accomplished project implementations.

The third question dealt with commonalities between the fields.

3. What are some of the common qualities between Organization Development and Project Management (e.g. tools, methodologies, skills, etc.)?

Question 3: Mayo Clinic - Enterprise Portfolio Management Office (EPMO)

Mayo Clinic participants listed several qualities found in both OD and Project Management. Their experience with this collaboration revealed the need for top down leadership support in both OD and Project Management departments. Neither department can function or grow to its full extent without leadership support. This support also assists the growth of resources. Investment in education includes skills development in both departments, thus increasing organizational effectiveness. For example, OD focuses on skills development and Project Management takes some of those skills and applies them to executing the organization's strategy.

Mayo Clinic interviewees explained how both OD and Project Management utilize planned interventions to complete their goals. As OD drives interventions with a focus on strategic change, Project Management drives interventions based off the progress of specific projects and the development of project resources. At Mayo Clinic the OLOD department is beginning to play a larger role in the training of staff, including those in Project Management. The need for skill development and increased planning around interventions is common in both OD and Project Management.

Question 3: Mayo Clinic - Office of Leadership and Organization Development (OLOD)

Mayo Clinic participants also described the planning aspects of OD and Project Management as being a common component. Both OD practitioners and Project Managers need to develop and execute project plans to accomplish their goals. These plans also extend to meetings and the overall structure of the engagement with the client or department. It does not seem to make a difference if one is in the field of OD or Project Management; they both require organization and planning skills. The focus can then be on the improvement of those skills through collaboration with others who perhaps have more experience or training with planning. This is an area of improvement Mayo Clinic uncovered in how OD practitioners develop their plans. The standard practices found in Project Management appear to be lacking in the field of OD. There is less focus on project planning tools and standards, making project planning more difficult.

Mayo Clinic interviewees also pointed out the need to stay creative; creativity is an area OD practitioners tend to excel in when compared to their project manager counterparts. This was identified as a potential area of growth for Project Management. The goal is to take the best

of both and combine them without losing Project Management standards or creativity. Mayo Clinic leadership outlined the need for a blend between creativity and realization of goals.

Mayo Clinic participants also explained the connection in roles. In OD the change manager plays a similar, yet separate role to the project manager. Both are heavily engaged in the project and need to be a part of the project throughout the lifecycle. Both are focused on project success, but see through different lenses. Project managers tend to be driven by scope, schedule, and budget, while change managers tend to be driven by the people side of change. Given the differences in these lenses, it is important, especially on large projects, to have two separate individuals take on these roles rather than assigning both roles to one individual. Understanding the importance and need for each role is critical, especially given the impact some projects have on the organization and those individuals internally impacted by the changes.

Question 3: Mercy Health System

Mercy Health System identified the organization's mission and goals as a common quality found between OD and Project Management. They believe both groups connect when it comes the overall strategy of integration within the organization. Remember, Mercy Health System is focused on collaboration; it is part of their DNA. Therefore it is not a surprise to see it as part of their vision. This open environment not only makes collaboration easier, it also increases team cohesiveness and collaboration.

The other common connection between OD and Project Management at Mercy Health System is with their drive to not only move projects forward but to also move people forward. Both OD and Project Management need to focus on motivating teams towards a common goal. This is not only required for project success, but also for the successful implementation of processes. Having the open and collaborative environment combined with the focus on motivating

teams make for exciting opportunities involving the collaboration between OD and Project Management.

Question 3: Rockford Health System

Rockford Health System has deadline expectations for both OD and Project Management. The two groups tend to complete their work in different ways in order to meet those deadlines. Project Management tends to be more focused on dates; whereas, OD utilizes soft skills that at times can be more difficult to measure. My research participants identified this as an area for improvement within OD. The ability to manage the OD projects more effectively by utilizing Project Management practices would be welcomed. This was also stated as an area for improvement at Mayo Clinic.

The answers to question four provided the following data.

4. What do you think Organization Development practitioners can learn from Project Managers and vice versa? How might that enhance the work done today?

Question 4: Mayo Clinic - Enterprise Portfolio Management Office (EPMO)

Mayo Clinic is a learning organization and therefore recognizes the need for OD to learn from Project Management and vice versa. Mayo Clinic explained that Project Management learns from OD in regards to creating high performing teams, increasing understanding of roles and responsibilities, and improving skills. Mayo Clinic strongly believes in the need for teams to incorporate the correct skill sets, appropriate training, and a complete understanding of roles and responsibilities. Without these components their success rates of projects and OD interventions drops significantly. Therefore, the incorporation of these components not only improves the effectiveness of Project Management but the organization as a whole.

The other interesting aspect of this learning component is how change impacts the goals. Understanding the impact change has on OD initiatives, as well as projects, is important for all organizations, especially those who are classified as learning organizations. Mayo Clinic's EP-MO department members commented on the importance of recognizing the role change plays in projects and of learning from changes occurring during the project lifecycle.

Mayo Clinic interviewees also recognized the need for OD and Project Management to learn from each other to help drive innovation and increase the speed for successful implementations. This is accomplished at Mayo Clinic through an increase in collaborative teams and stakeholders who assess what was learned from each engagement. This process found in both OD and Project Management at Mayo Clinic has been identified as a key component in the collaboration between OD and Project Management throughout this dissertation and, again, is part of every learning organization.

Mayo Clinic believes so strongly in the learning and education environment, it reached out to the local community college, Rochester Community & Technical College (RCTC) to collaborate on Project Management classes funded by a grant awarded by the state of Minnesota. The grant was co-written by members of Mayo Clinic and RCTC and focused on providing a blended learning process to augment the more typical Project Management Body of Knowledge (PMPOK) educational classes, and to assist those filling the roles on projects (e.g. Project Sponsor, Executive, Talent Triangle, etc.).

The classes also utilized feedback from students and other teachers to help increase the effectiveness of the class and to ensure proper content. Feedback loops play a key role in OD and now we see them contributing to the collaboration between OD and Project Management through education. In addition to the collaboration with RCTC, Mayo Clinic's EPMO also

reached out to the OLOD department to help with the class infrastructure support. This outlines another area of collaboration between the two groups.

Question 4: Mayo Clinic - Office of Leadership and Organization Development (OLOD)

Those practicing OD at Mayo Clinic also outlined the need for more standardized tools within their department, thereby supporting the notion they could learn from those in Project Management who have a history of standard tools, processes, and methodologies.

The other aspect of learning from each other is in regard to collaboration and removing silos. This was a key to success in the discussions with Mercy Health System staff. Mayo Clinic participants also recognize the need for improvement regarding working across departments, collaborating on ideas and problem solving in order to develop stronger plans and to manage projects with more efficiency and higher rates of success. The collaboration of OD and Project Management can be used to help start this collaboration and develop problem-solving techniques.

Another area of collaboration between the EPMO and OLOD is in project lifecycles. The two groups have learned from each other just how important it is to understand the phases of a project, and the connection they have to the people impacted by those projects. The closing process of projects is changing due to the increased understanding of communication and change management. These components are still active past the point of a traditional project closing. We are even seeing PMI adopt change management principles into their framework and newer releases of the PMBOK.

Finally, OD and Project Management need to understand the value of this collaboration and the positive outcomes it can have on those involved. Both OD practitioners and project managers have full schedules with little time for additional work. The focus here is not on

adding work but working more efficiently. These changes to how the two groups work have positive effects on energy and ownership. They also increase engagement, something both OD and Project Management strive to accomplish in all of their initiatives.

Question 4: Mercy Health System

Mercy Health System outlined many of the same learning opportunities Mayo Clinic described. The ability to apply more structure and process to the OD initiatives while increasing the communication and soft skills of Project Management is becoming a common theme. Some organizations are just now recognizing this, while others are implementing changes to address it.

Another aspect of learning identified by Mercy Health System staff is in gaining a better understanding of how projects within an organization impact the organization on a systemic level. Project managers can learn from OD when incorporating a systemic view of their project and the place it has within the organization. This can apply to project priority, resources, timeline, etc.

Education is yet another area in need of improvement and can be applied to both OD and Project Management. This not only applies to the education required for obtaining more skills, but also educating end users impacted by projects and OD initiatives, similar to the 'K' in AD-KAR in regard to knowledge. In some cases this type of education is not utilized to the full extent or, even worse, missed completely.

One of the opportunities for growth identified in the Mercy Health System interviews is their need for more formal change management processes. Taking some of the process strengths of Project Management to help identify some of the weaknesses within OD, and then turning those weaknesses into strengths by applying the missing structure, might help develop effective

formal change management processes. Mayo Clinic adopted ADKAR from Prosci; utilizing a similar approach could be beneficial for Mercy Health System.

This collaboration between OD and Project Management might also require a common vocabulary. The two groups could learn from each other by implementing some, or all, of the components outlined in this dissertation and in the process identify the need to adjust the vocabularies to avoid confusion. One example might be change management. In Information Technology Project Management, Change Management focuses on process, whereas OD focuses more on people.

Question 4: Rockford Health System

Rockford Health System identified many of the same learning opportunities previously discussed with Mayo Clinic and Mercy Health System. In addition to those, the interview discussions also focused on how OD can learn from Project Management in regards to monitoring and reporting on costs and budgets. The tracking of project scope, schedule, and budget can be applied to OD resulting in an increased effectiveness and perhaps even buy-in or support when it comes to the recommendations offered by OD practitioners.

Softer communication was mentioned as an area of improvement for project managers, and one on which OD likely could have a positive impact. It could be said OD practitioners tend to have more formal training when it comes to communication, and given the largely technical aspects of projects, the communication formats tend to utilize terms not recognized by all stakeholders. A greater focus on communication style and methods could improve the way projects are managed.

Conclusion

The following is a table outlining the summarizing points from the four interview questions across all three organizations.

Question 1
Mayo Clinic's collaboration between Organization Development and Project Management included the following key themes.
Leadership Driven: support, engagement, consistent
People Focused: centered on the people before process
Education/Standards/Terms: utilized these components to drive the integration
Systemic Approach: recognized the need for this to occur across the enterprise
External Consultants: utilized outside assistance to help provide direction
PMI and Prosci: integrated existing methodologies
Early Adoption: understood the need to engage resources early to increase support and buy-in
Communication: consistent and clear
Mercy Health System's collaboration between Organization Development and Project Management included the following key themes.
Informal Blending: utilized an informal process focusing on integrating teams
Silos: recognized the need to remove silos
Shared Goal: identified this integration as the organizations shared goal
Learning Organization: incorporated continuous learning
Malcolm Baldrige National Quality Award: helped focus the need for the integration
Communication: consistent and clear

Leadership Driven: support, engagement, consistent
Rockford Health System's integration of Organization Development and Project Management included the following key themes.
Informal Blending: utilized an informal process focusing on integrating teams
Project Driven: Electronic Medical Record (EMR) project helped push for the need for change management, leading to the collaboration of OD and Project Management.
Strengths: still early in the process but plan to integrate the strengths of OD and Project Management
Question 2
Mayo Clinic's participants shared their knowledge of other organizations collaborating between Organization Development and Project Management.
NASA: integrated teams with a focus on project management
Hewlett Packard (HP): utilized education and training
Siemens: utilized education and training
Nike: early integration within projects keeping the integration until the project was completed.
McKesson: early integration within projects, keeping the integration until the project was completed.
Muir: early integration within projects, keeping the integration until the project was completed.
Cisco: early integration within projects, keeping the integration until the project was completed.

Mercy Health System's participants had no knowledge of other organizations collaborating between Organization Development and Project Management.
No examples given
Rockford Health System's participants knew of two other organizations collaborating between Organization Development and Project Management.
University of Pittsburgh Medical Center (UPMC): change management, communication, and lessons learned
Epic: utilized education and training
Question 3
Mayo Clinic's participants described the following six common qualities between Organization Development and Project Management.
Support: both require top down leadership support
Education: both utilize skill development
Strategic Plan: both have an end result that focuses on the organization's strategic plan
Planned Interventions: both use planned interventions to achieve goals
Planning: both require project plans and need a balance between structure and creativity
Roles: both have a Change Manager and Project Manager
Mercy Health System's participants described two common qualities between Organization Development and Project Management.
Mission/Goals: both play a role in obtaining the organization's mission and goals
Motivation: both have the need to motivate teams
Participants from Rockford Health System indicated one common quality between

Organization Development and Project Management.
Planning: both require project plans, and need a balance between structure and creativity
Question 4
Mayo Clinic's interviewees detailed what organization development practitioners can learn from project managers and vice versa.
Learning Organization: improving skills, education, and effectiveness
Change: learning how change impacts both groups
Goals: recognizing the impact each group has on the goals of the organization.
Standardized Tools
Collaboration and Removing Silos
Lifecycle: recognizing the impacts post project
Engagement: increasing energy and success
Mercy Health System's participants explained their views on what organization development practitioners can learn from project managers and vice versa.
Structure/Process
Systemic Impact
Education
Change Management
Common Vocabulary
Rockford Health System's view on what organization development practitioners can learn from project managers and vice versa offered additional insights.
Financials: more rigor around reporting

Communication: softer and easier to understand

The interviews with Mayo Clinic, Mercy Health System, and Rockford Health System participants revealed many similarities in regard to collaborating between OD and Project Management. Some of the key components covered in most, if not all, of the interviews included:

- Change Management
- Leadership (driven from the top, consistent, and clear)
- Education (learning organizations)
- Planning/Early Adoption

Change Management, Leadership Driven, Education, and Early Adoption are key factors capable of influencing both OD and Project Management as separate fields; so, it should not come as a surprise to see each of them play a role in the collaboration of skills and best practices between the fields.

Change Management appears to be a great starting point for the integration of OD and Project Management. It is both people and process focused. The ADKAR process mentioned earlier is a process managers can appreciate given the ability to track and plan around it. It also incorporates many OD strengths such as engagement, awareness, education, and communication. The increased use of Change Management within Project Management will likely have positive impacts on the project team, as well as, ancillary stakeholders as a result of the increased communication and early engagement with the project.

The field of OD has years of experience with change and leadership. It is clear organizational change requires constant, consistent, and clear communication from leadership. The collaboration of OD and Project Management also requires the same approach. Without leadership

approval and support it is unlikely a lasting connection between OD and Project Management will occur. There might be pockets of collaboration within an organization, but without the systemic approach top down leadership can provide, those pockets lack the key strengths outlined in this research.

Both OD and Project Management have strong connections to education. This is another way of bringing the two together. The program outlined between OLOD and the EPMO at Mayo Clinic is one example of how these two groups can work together to improve the skills of OD practitioners and project managers. The collaboration on a shared goal, in this case classes and programs, is a proven technique used to create cohesive teams. This technique has proven successful with the collaboration between OD and Project Management as well.

Project Management has a strong focus on plans and planning. Project managers spend many hours creating project plans, documenting issues and risks, and tracking the project scope, schedule, and budget. Organization Development invests significant effort around the individual and how change impacts the individual. The combination of planning and early adoption of the OD focus on the individual has been identified as another key component in collaborating between OD and Project Management. This combination not only increased project success as discussed with Change Management, it also increased the effectiveness of OD interventions by adding more structure to how those interventions are executed. This additional structure, in the form of plans, progress tracking, and reports not only positively impacts the success rates for the interventions, but also increases the ability for the organization to quantify the work.

The next step is to take these four key components and see how they are utilized in an actual project within one of the three organizations covered in this research. I chose Mayo Clinic and their Electronic Medical Record (EMR) project for this deeper dive. This project is the larg-

est one to date and incorporates both OD and Project Management. The focus of this phase of the research covers the following.

1. Content (what did you do differently on this project regarding collaboration between OD and Project Management)
2. Process (how did you do it differently)
3. Premise (why did you do it differently)

Henry Plummer, M.D. is recognized for developing the medical record system at Mayo Clinic over 100 years ago. Because of the profound impact on Mayo Clinic and the medical record system, the name Plummer was assigned as the project name for the EMR project. The company Mayo Clinic chose to collaborate with on this project is Epic, one of the most advanced software companies in Healthcare.

One of Epic's many strengths is it takes what it learned from previous projects to improve current projects. Epic takes the time to better understand what features their clients request, and, in the process, adds those requests to the product offering for future clients. This is another component of a learning organization. Epic takes this process of learning from others seriously and puts it into practice in an annual conference called the User Group Meeting (UGM). This strengthens its ability to learn, grow, and evolve. From this process the organization is able to further enhance the learning aspect of its culture. Through the Plummer project, Mayo Clinic has seen the value in this type of learning and plans to implement similar features in their strategy.

Leading up to the Plummer project, Mayo Clinic spent the last decade focusing on improving their communication and Project Management processes. The creation of the EPMO, mentioned earlier, and the adoption of communication plans, usability labs, and stakeholder

management documents have all played a role in increasing the rigor of both OD and Project Management. In recent years, Mayo Clinic has consulted with firms, such as, Aeritae Consulting Group, Ltd. to assist in the process of becoming more unified and standardized. This, in combination with Mayo Clinic's adoption of Prosci tools and classes, has helped prepare the organization for massive projects like Plummer.

Learning and growth were key components outlined in Epic's strengths. This also applies to Mayo Clinic. Education has been a reoccurring theme in this research. Those involved with the Plummer project outlined the need for Mayo Clinic leadership to create a cultural acceptance of personal education and growth. It can be difficult for those engaged with such a large project as the Plummer project; so, it becomes necessary for education to be considered part of the day-to-day work, similar to the way administrative time is considered part of the daily job. Mayo Clinic provides overwhelming support for education ranging from conferences to formal graduate level courses where tuition reimbursement is even offered. The three shields making up Mayo Clinic's logo stand for Practice, Research, and Education. Because of the connection education has to Mayo Clinic's culture, it is not a surprise to see it show up in their largest project to date.

Some interesting questions came up during the discussions with Mayo Clinic's Plummer project team members. For instance, how do we incorporate OD, specifically Change Management, into a project already in flight? Do we pause the project? Do we restart the project, this time incorporating Change Management? At Mayo Clinic, the project team members addressed this question by assessing the project and slowly integrating pieces of Change Management at a pace that does not derail current project progress. This process of slow collaboration not only keeps projects moving forward, but also increases the appreciation for Change Management and

OD in general. It also increases the success rates of projects due to many of the findings accounted for in this research. That being said, Mayo Clinic leadership believes early adoption is best and should be utilized whenever possible.

Another question that came up in our discussions focused on the roles of change managers and project managers. Specifically, do smaller projects require both a change manager and project manager? It might be easier to get resources assigned to both roles on larger projects with more funding, but smaller projects could conceivably struggle in securing dedicated resources for both roles. Those involved with the Plummer project agreed there could be such struggles; however, the importance of both roles remains.

The solutions used in past projects at Mayo Clinic involved training a current project resource to assist in Change Management. This could involve the use of OLOD to provide brief formal or informal training sessions to increase the skill set of a project team member so the key aspects of Change Management could be applied to the project without the need for a full time professionally trained change manager. This process also makes it possible for OLOD to impact more projects within the organization than if they only focused on the projects for which they had resources.

The interesting thing about Change Management in regard to roles and responsibilities in the Plummer project, and outside of this effort, is how it positively impacts the efficiency of the project. One example included the reduction in the number of meetings required and the improvement of the quality found within the meetings. Understanding roles and responsibilities and communicating that information helped to make meetings more effective and rewarding. The amount of work accomplished increased and the quality of the work increased.

One of the most interesting outcomes from this case study is how Mayo Clinic has recognized the need for their project managers to have a better understanding of soft skills and the ability to incorporate those skills into their projects. The concern about project managers being focused only on tasks and not on the bigger picture was raised. With Mayo Clinic being a matrix organization, meaning project teams do not necessarily report to project managers, it is imperative for project managers not only to provide management services but also leadership services. Project teams need someone to motivate, energize, and create passion within the project. Project managers need to incorporate soft skills to address these needs and to gain the support of the project team.

Training was identified as one of the first components of the Plummer project. Those engaged with the project were expected to go through Epic training and testing to increase their understanding of the software and process. Communication was a close second to the training. The project team was encouraged to spend time getting to know one another and this helped to progress through Tuckman's (Tuckman, 1965, p. 396) stages of group development; forming, storming, norming, and performing.

They also spent considerable time working with Subject Matter Experts (SMEs) on collaborative builds. This collaboration created an environment focused on building cohesive teams. When it came to lessons learned, however, Mayo Clinic identified the need to spend more time helping the SMEs better understand their role and prepare them for the questions and feedback they would receive along the way.

The creation of a Change Management Team occurred late in 2015; however, numerous OD practices took place well before that, including readiness assessments and the utilization of ADKAR to assist with managing change. These components were added in early 2015 shortly

after the initial kickoff of the project. This is important to note as a common theme found in this research concerning the importance of early adoption. The early adoption of OD within this project also included the consulting services of Deloitte. The collaboration between Mayo Clinic and Deloitte helped strengthen the effectiveness of OD within the EMR project

The creation of the Change Management Team was a result of both OLOD support and Mayo Clinic's maturing use of collaborating between OD and Project Management through the focus on Change Management. One of the key focus areas for the Change Management Team was around user engagement. The following is an excerpt from a communication sent out to Mayo Employees seeking interest in participating in the Change Management Team.

By way of introduction, the Change Management Team has been formed to create strategies that support and drive adoption of the EHR/RCM throughout the phases of the Plummer Project. Dedicated change management analysts are part of the Central Change Management Team and support the following activities:

Builds out the Readiness Agent Networks for each site

- Engages with/liaises with Site Readiness Owners
- Develops specialized content for stakeholder groups

Impact Analysis

- Develops Impact Analysis playbook
- Works with WF Engineers to and others as directed to plan operational impact analysis approach
- Develops workflow packets including corresponding decisions, documentation to facilitate analysis sessions
- Facilitates analysis sessions with Field Team, Workflow engineers

- Analyzes areas of risk and work with Risk Oversight team and Controls group to incorporate into readiness plans
- Report Findings to project leadership
- Transition enterprise action items to enterprise owners

Readiness Activities

- Coordinate resources across Plummer Project Team and Mayo departments to develop core content for readiness activities
- Develop playbooks for practice labs, workflow walk through/dress rehearsal
- Work with communication resources to develop centralized materials, update website, RAQs, etc. (Mayo Clinic, 2016)

The Plummer project will include an impact analysis across departments to help gain a better understanding of the influence this project is having on the organization. This type of analysis is not only beneficial to the project through the inclusion of a fresh look at the work but also to ancillary stakeholders who may at times feel left out. This helps to reinsure them of the value their input brings to the project.

One interesting impact the EMR project had on the organization was in regard to the process of posting for positions within IT. Previously postings for IT positions were processed through Mayo Clinic's normal job positing site. However, this project created the need for a change in that process and now incorporates "Calls for Interest." A weekly posting to IT now incorporates these calls for interest positions and makes it much easier to stay up to speed on the organization's needs when it comes to open positions. This example helps to show how the organization is evolving and learning.

Moving forward, Mayo Clinic plans to use much of what they have learned through the collaboration between OD and Project Management in future projects, especially large projects. As part of the Plummer project they are documenting the Change Management work and creating toolkits to be used on future projects. They are also using after action reviews and lessons learned to gather as much information as possible to help move future projects forward and stay clear of making repeat mistakes. The Mayo Clinic focused on the following three areas in their after action reviews:

1. Content (what did you do differently on this project in regard to integrating OD and Project Management)

Learning Organizations and Change Management are two reoccurring themes found throughout the research and the Plummer project incorporated both. Through Mayo Clinic's evolution in OD and Project Management, leaders were able to identify what needed to be done differently with this project when compared to previous projects. The process used for posting open positions, the use of a Change Management Team, and the process of learning from others all played key roles in doing things differently in regard to collaborating between OD and Project Management.

2. Process (how did you do it differently)

The process used with this project also changed. It appears the collaboration between OLOD and the EPMO, covered in the summarizing points for questions 1- 4 in this chapter, helped set the stage for mega projects like the Plummer project. This is a great example of how collaborating between OD and Project Management can help prepare organizations for future projects and therefore save time; if the organization had not been at this level of maturity prior to projects like Plummer impacting the entire organization to an extreme extent, they would have

needed to play catch-up. The impact the collaboration between OLOD and the EMPO at Mayo Clinic had on process is critical and had an indirect, yet profound, impact on the Plummer project.

3. Premise (why did you do it differently)

The premise for these changes likely originated from understanding healthcare is changing and therefore the way we manage healthcare projects needs to change with it. The size of projects like the Plummer project requires different management techniques when compared to smaller projects. Lastly, we may be witnessing an evolution in how projects in general are managed. The current push in project management towards agility and away from the historically prevalent waterfall process is a sign of how Project Management continues to evolve and the integration of OD best practices is likely playing a role in that evolution.

Chapter 5: Findings and Future Research

Findings

Change Management, Leadership Driven, Education, and Early Adoption are key factors capable of influencing both OD and Project Management as separate fields; so, it should not come as a surprise to see each of them play a role in the collaboration of skills and best practices between the fields. Each of the organizations discussed in this research utilized each of the key factors mentioned above to move closer to the proposed best practice of collaborating between OD and Project Management. The summarizing points below will outline the path for this best practice.

Summarizing Points

The following is a complete list of the summarizing points identified in all of the interviews across the three organizations. This list was used to identify the essential steps utilized by the pioneers identified in this research.

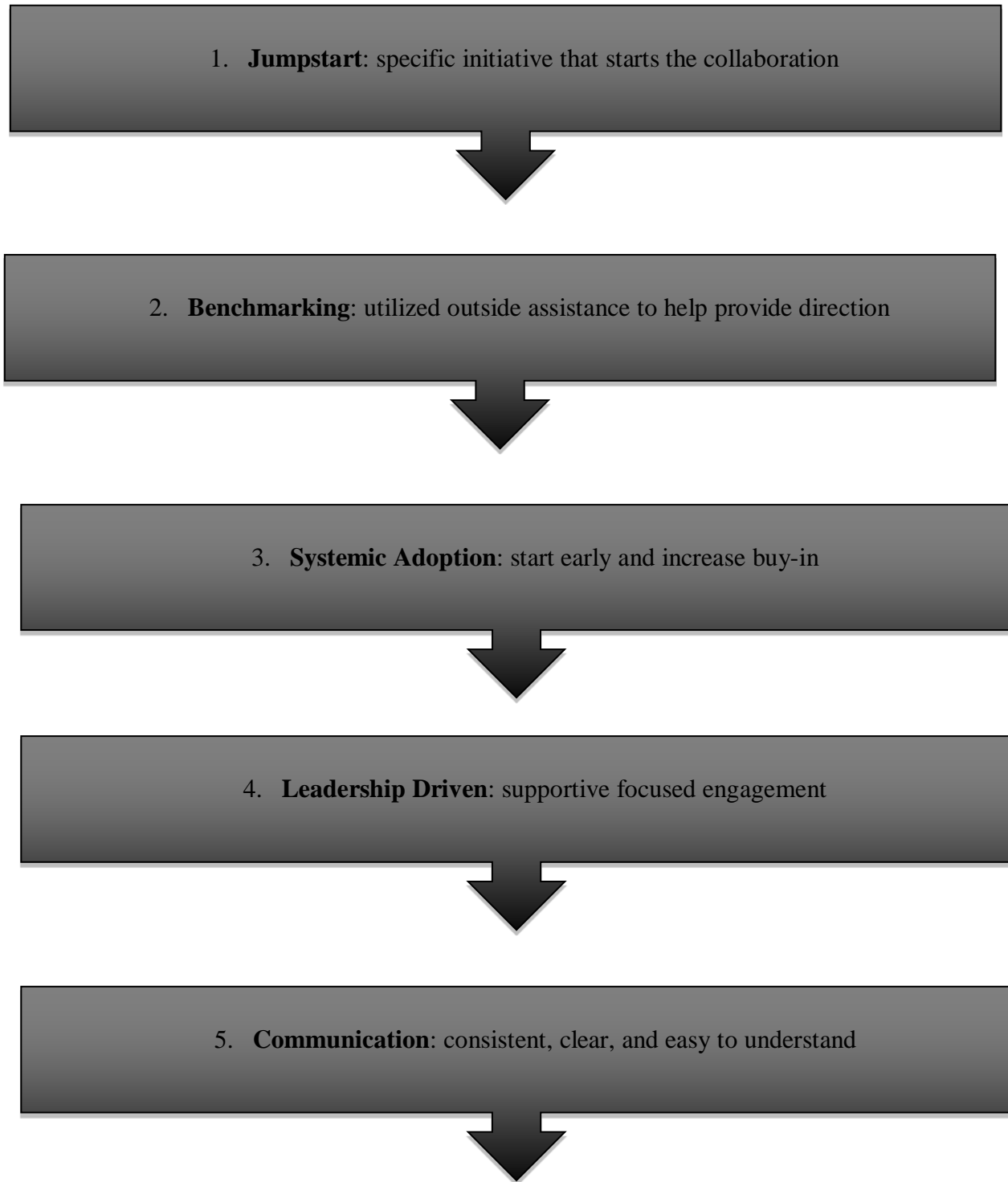
- Leadership Driven: support, engagement, consistent
- People Focused: centered on the people before process
- Education/Standards/Terms: utilized these components to drive the integration
- Systemic Approach: recognized the need for this to occur across the enterprise
- External Consultants: utilized outside assistance to help provide direction
- PMI and Prosci: integrated existing methodologies
- Early Adoption: understood the need to engage resources early to increase support and buy-in
- Communication: consistent and clear

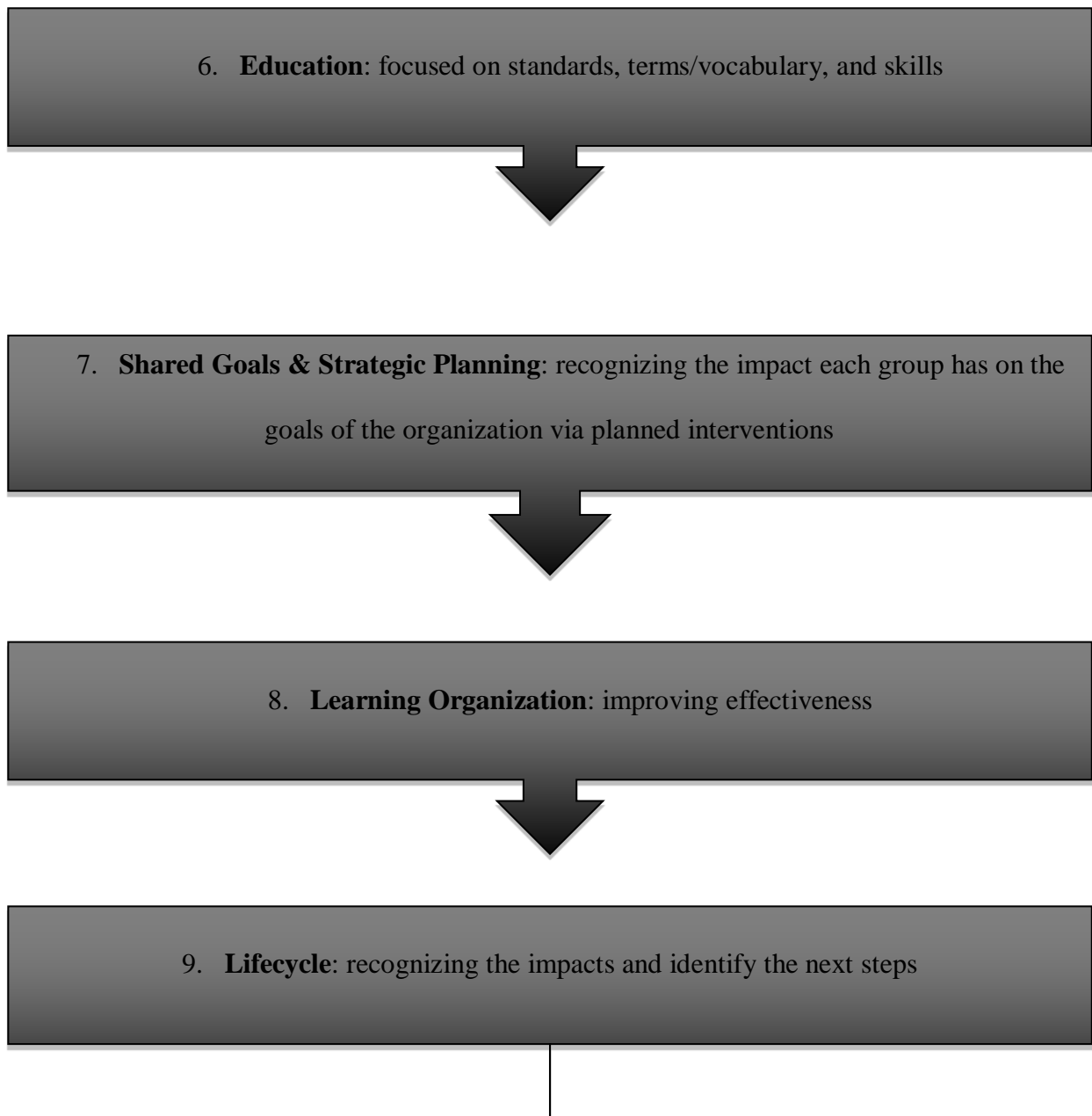
- Informal Blending: utilized an informal process focusing on integrating teams
- Silos: recognized the need to remove silos
- Shared Goal: identified this integration as the organizations shared goal
- Learning Organization: incorporated continuous learning
- Malcolm Baldrige National Quality Award: helped focus the need for the integration
- Communication: consistent and clear
- Leadership Driven: support, engagement, consistent
- Informal Blending: utilized an informal process focusing on integrating teams
- Project Driven: Electronic Medical Record (EMR) project helped push for the need for change management, leading to the collaboration of OD and Project Management.
- Strengths: still early in the process but plan to integrate the strengths of OD and Project Management
- Support: both require top down leadership support
- Education: both utilize skill development
- Strategic Plan: both have an end result that focuses on the organization's strategic plan
- Planned Interventions: both use planned interventions to achieve goals
- Planning: both require project plans and need a balance between structure and creativity
- Roles: both have a Change Manager and Project Manager
- Mission/Goals: both play a role in obtaining the organization's mission and goals

- Motivation: both have the need to motivate teams
- Planning: both require project plans, and need a balance between structure and creativity
- Learning Organization: improving skills, education, and effectiveness
- Change: learning how change impacts both groups
- Goals: recognizing the impact each group has on the goals of the organization.
- Standardized Tools
- Collaboration and Removing Silos
- Lifecycle: recognizing the impacts post project
- Engagement: increasing energy and success
- Structure/Process
- Systemic Impact
- Education
- Change Management
- Common Vocabulary
- Financials: more rigor around reporting
- Communication: softer and easier to understand

Below are the nine essential steps taken from the interviews summarizing points. These steps can be used not only to walk an organization or consultant through the process of improving OD and Project Management collaborations, but also as a model to indicate what level of maturity the organization or individual is at in regard to this collaboration: the higher the number, the more mature in the process of collaboration.

Model for Collaborating between OD and Project Management





The use of the nine steps outlined above to aid in the organizational collaboration between OD and Project Management can also be applied to individual consultants and practioners. These steps can be utilized to become better practioners in the fields of OD and Project Management by helping clients better understand the importance of this collaboration.

It is important to note the theoretical and practical relevance of this research.

Organizations practicing this model could theoretically expect to see similar results as those interviewed. The results could include, but are not limited to, increased communications, fewer silos, increased number of successful projects, and increased organizational effectiveness. The practice and education of this model should help reinforce these results and could also play a key role in turning this model into a best practice across industries. Practicing this model cannot guarantee positive results, however, the model is comprised of practices found in highly successful organizations and at a minimum should be able to provide a measurable level of improvement to the areas applied.

Essentially the purpose of this research was to identify strengths from each field to improve the other. The practice of this can be clarified by using specific examples. In OD engagements there is often a need to assess risk. The use of Risk Management tools found in Project Management can help OD practitioners not only accurately document risks but also categorize and rate them with a higher degree of accuracy. Alternately, in Project Management there are occasions when changes to scope, schedule, or budget need to be communicated. These are usually referred to as, change requests. Some organizations have strict processes and procedures around change requests while others are more relaxed. In either case, communication is the key. Not only does the communication need to be clear, it must also be verified. Verifying project stakeholders have a proper understanding of a change request is a step frequently overlooked by project managers. It is here where OD and Change Management can play a role in strengthening Project Management

Limitations

There are a number of limitations with this study; the limited number of organizations exploring this new collaboration and the small sample size are the two primary limitations. The convenience sampling is also a limitation. However, given the limited number of organizations attempting this collaboration there were also limitations in the available methods to collect and organize the data. The suggestions for further research identified in the next section could be used to address some of these limitations. However, some of these limitations will continue to exist until there is either more research, or an increase in those practicing this collaboration.

Further Research

During the interviews, participants identified a number of organizations as fellow pioneers in the collaboration of OD and Project Management. These organizations, listed below, should be included in the next phase of research to expand the scope of organizations and industries.

- NASA: integrated teams with a focus on project management
- Hewlett Packard (HP): utilized education and training
- Siemens: utilized education and training
- Nike: integrated within projects early on, keeping the integration until the project was completed.
- McKesson: integrated within projects early on, keeping the integration until the project was completed.
- Muir: integrated within projects early on, keeping the integration until the project was completed.

- Cisco: integrated within projects early on, keeping the integration until the project was completed.
- University of Pittsburgh Medical Center (UPMC): employed change management, communication, and lessons learned
- Epic: utilized education and training

As discussed earlier, the companies experiencing the most success with this collaboration have done so through the use of blending the processes found in OD and Project Management. If this is found to be true with the organizations listed above, it will only strengthen the validity of the findings and continue the evolution towards becoming a best practice.

In addition to the continued research with the organizations listed above, further research should be focused on the use of the model outlined for collaborating between OD and Project Management. The trail of this model within organizations from differing industries will help to identify the usefulness of the model and how it impacts the organizations trialing it.

Finally, the OD Network could add a degree of unity by becoming a gold standard for the field of OD. The two main areas for improvement in OD standards would likely fall in the areas of certifications and the creation of an industry standard manual similar to PMI's PMBOK.

Researcher's Bias

My bias as the researcher for this project is likely limited to having more experience as a project manager than an OD consultant. I have practiced project management in IT over the last 10 years and have focused on OD over the course of my doctoral program for the last four years. Having a greater career focus on Project Management may have introduced some level of bias while gathering data from the interview questions. To mitigate the impact from this bias,

I utilized the input from industry experts while designing my interview questions to insure I did not accidentally word an interview question to provoke a specific response.

Summary

I investigated the results of the collaboration between OD and Project Management within three organizations. The nine steps outlined earlier reflect many industry best practices; what differentiates them in my research is the order of implementation and the application towards OD and Project Management. All three organizations interviewed decided the chances of meeting their goals would be increased if they brought OD and Project Management together to collaborate on their areas of expertise. This is a powerful example of how these two fields can work together to help organizations achieve their goals.

The application of this collaboration can also expand to the networks/organizations representing each field, the OD Network for OD and PMI for Project Management. These two organizations could improve their standing if they also collaborate using the model outlined in this research. There could even be a place for future OD/PM certifications as a result of these two groups working together.

Finally, the market value of this collaboration can be found in using this process to increase the ability of an organization, practitioner, or network (e.g. OD Network or PMI) to successfully achieve its goals by examining and implementing the best practices found in both OD and Project Management. As the abstract mentioned, projects are failing at alarming rates, the more we can do to increase success rates for projects the more successful those using this model will be.

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Appendix A

Risks and Benefits

I have kept the records of this study confidential. I have not included interview names or titles in my dissertation, nor will I if I publish articles. My research data includes recordings, master list of resources and data gathered from interviews, and computer records stored on password protected devices accessible only to the transcriber and me. I will destroy all my research data after three years.

Appendix B

Informed Consent

The following statement was provided to interviewees:

I am conducting a study about the benefits an organization can experience when combining tools, techniques, and methodologies utilized in the fields of Organization Development (OD) and Project Management. I am reaching out to you because of your connection to the Organization Development and/or Project Management fields.

This research project will utilize case studies. I will be asking you to participate in one interview in order to gather information regarding Organization Development and Project Management within your organization. I will record this approximately one-hour session securely on a password-protected device (iPhone and/or MacBook). These one-on-one interviews will take place in person (when possible) or via phone.

Appendix C

Participant Information

This research is dependent on the knowledge and expertise of individuals who are working in organizations that have participated in the process of, or shown interest in, the collaboration of Organization Development and Project Management. The professionals selected for these case studies are members of that population. This research does not exclude women or minorities. This research does not include children.

I sent the following message to request participation from organizations.

Hello, my name is Eric Pool and I am working on my dissertation concerning the integration of Organization Development and Project Management within organizations. I would like to know if you would be interested in answering a few questions to help create a case study describing how your organization has integrated these two fields? Your participation is completely voluntary and you may withdraw at any time. There are no risks associated with this study.

I also provided the following notice to the organizations agreeing to participate.

Your participation in this study is entirely voluntary. Your decision whether or not to participate will not affect your current or future relations with the University of St. Thomas. If you decide to participate, you are free to withdraw at any time up to and until September 1, 2015. Should you decide to withdraw, data collected about you will not be used. You are also free to skip any questions I may ask.

Appendix D

Lay Summary

Organization Development (OD) can provide a focus on ways to help an organization run more effectively and efficiently, and project management focuses on successfully managing project scope, budget, schedule, and quality. The collaboration of these two disciplines is a fairly new field of focus. While some research has started to outline these benefits many unanswered questions remain. Questions such as, how can we best structure OD and Project Management departments so they work together to further strengthen the skills used by each discipline? How can a rating system be used to identify the maturity level of an organization's ability to successfully collaborate between OD and Project Management? The answers to these questions, and many others, will help increase an organization's ability to effectively execute projects across their enterprise.